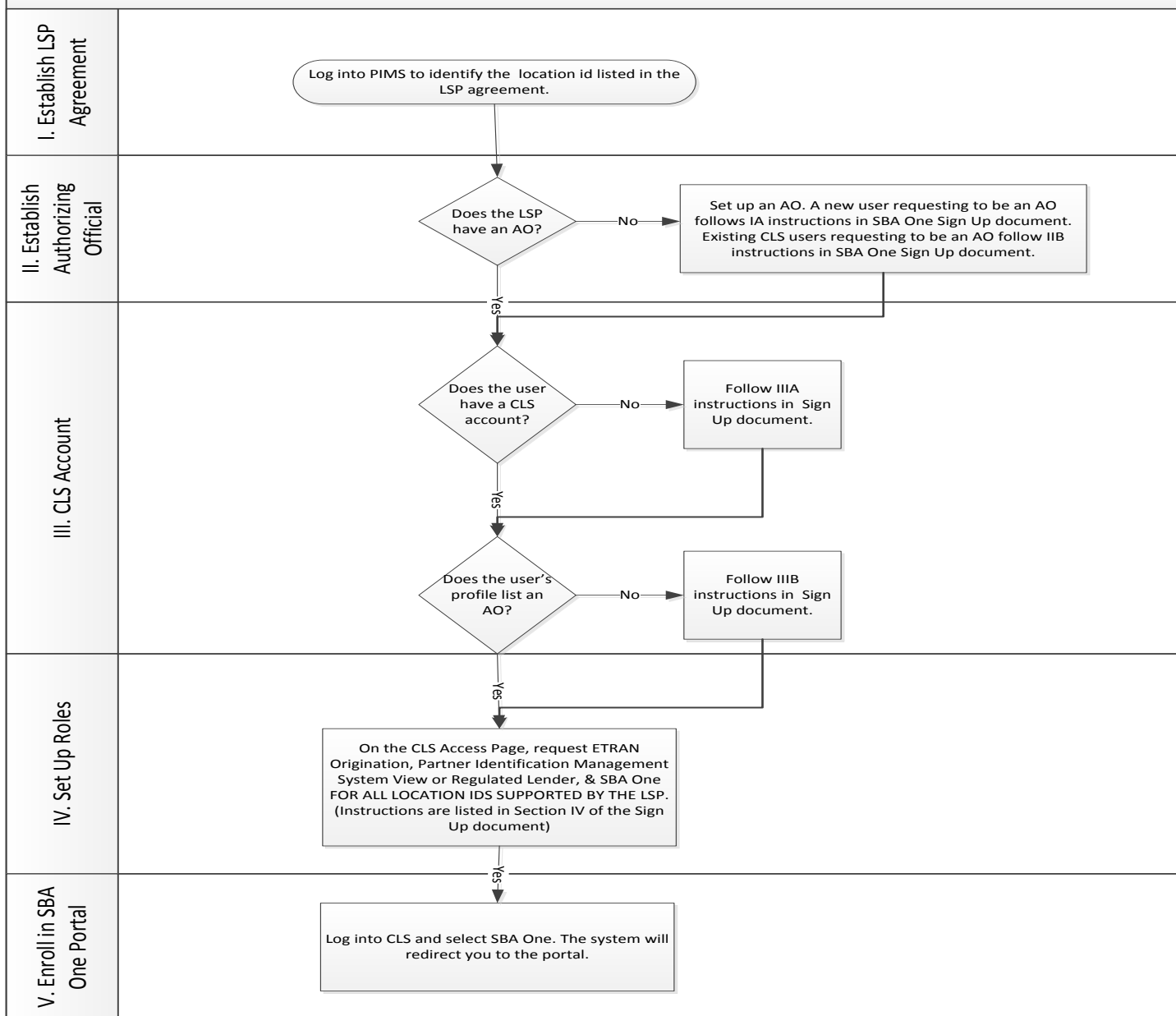


SBA One is a portal that is integrated with the Capital Access Financial System (CAFS). CAFS is the integration of SBA's guaranty and Disaster loan programs' full loan life cycle which includes lender/borrower matchmaking, origination, servicing, and post servicing. CAFS also supports the surety guaranty bond program.

CAFS is accessed via the CAFS Login System (CLS). The production URL is <https://caweb.sba.gov> and the test URL is <https://catweb2.sba.gov>. If you have questions, contact CAFS@SBA.gov.

Signing up for SBA One is a 5 part process and requires a valid agreement for 7a lending. The steps are *I. Establish LSP Agreement. II. Establish the Authorizing Official III. Set Up Account IV. Set Up Roles V. Enroll In SBA One Portal.*

SBA One LSP Enrollment (Production URL: <https://caweb.sba.gov> Test URL: <https://catweb2.sba.gov>)
For assistance, contact CAFS@SBA.gov



I. ESTABLISH LSP Agreement

Lender Service Providers (LSPs) must have the location id listed in their SBA LSP agreement.

II. ESTABLISH AUTHORIZING OFFICIAL (AO)

Before signing up for SBA One, make sure that your organization has registered an AO. All partner accounts must include an AO listed as a supervisor in the CLS profile. The AO is responsible for approving partner accounts and recertifying the accounts bi-annually. IF you have registered an AO and the AO is listed in your profile, skip to section III.

A. NEW CLS USER REQUESTING AUTHORIZING OFFICIAL ROLE

1. Go to the URL and agree to the terms in the warning banner by clicking "I agree to these terms".
2. On the left navigation page, click "Create New SBA CLS Account".
3. Complete the sections labelled "Login Information", "Identity Information", "Contact Information" and "Business Associated With Account"
 - a. Under Identification Information
 - i. Select "Partner" for user type
 - ii. Under Partner Information, Enter the Headquarters Location ID for "Partners Location"
 - iii. Select "Authorizing Official" under "Job Classification"
 - b. Under "Supervisor Information"
 - i. If you are the first authorizing official for a location id, complete the form and submit the request. LEAVE THE SUPERVISOR SECTION BLANK & send an email to CLS@SBA.gov with subject "PRODUCTION Authorizing Official Approval Request" OR "TEST Authorizing Official Approval Request".
 - ii. If there is/are authorizing official(s) associated already registered for your location id, enter either the first and last name OR email address of one of the AOs and click "Lookup Supervisor by Email OR First Name/Last Name. Complete the form and submit request.
4. You will receive an email verifying your email address. You must click the link in the email and verify your email address within 48 hours. If you do not respond within 48 hours, the request will be deleted.
5. After the AO (if you are not your own AO) and OCA IT Security have approved the request, you will receive an email from cls@sba.gov that your account has been approved.

B. EXISTING CLS USERS REQUESTING AUTHORIZING OFFICIAL ROLE & THE USER DOESN'T HAVE AN AO IN THEIR PROFILE

1. LEAVE THE SUPERVISOR SECTION BLANK & Send an email to CLS@SBA.gov with subject "PRODUCTION Authorizing Official Approval Request" OR "TEST Authorizing Official Approval Request". In the email, request to be signed up as an AO.
2. You will receive an email from cls@sba.gov when your request has been granted.

C. EXISTING CLS USERS REQUESTING AUTHORIZING OFFICIAL ROLE & THE USER DOES HAVE AN AO IN THEIR PROFILE

1. Go to the URL and agree to the terms in the warning banner by clicking "I agree to these terms".
2. Log into the system
3. At the top of the page, select "Profile"
4. Select "Authorizing Official" under "Job Classification"

After the AO (if you are not your own AO) and OCA IT Security have approved the request, you will receive an email from cls@sba.gov that your account has been approved.

III. Set Up CLS Account/Update Profile

Account access and requests must be approved by an AO. New users must set up an account and existing users must verify that there is a valid AO associated with their account. IF you have an account with an AO in the profile, skip to section IV.

A. NEW CLS USER (Users who didn't have a GLS account prior to May 2015 OR Never Established a CLS Account)

1. Go to the URL and agree to the terms in the warning banner by clicking "I agree to these terms".
2. On the left navigation page, click "Create New SBA CLS Account".
3. Complete the sections labelled "Login Information", "Identity Information", "Contact Information" and "User Information"
 - a. Under User Information
 - i. Select "Partner" for user type
 - ii. Enter the Location Id for "Customer Location"
 - b. Under Supervisor Information, enter either the first and last name OR email address of one of the AOs and click "Lookup Supervisor by Email OR First Name/Last Name. Complete the form and submit request.
4. You will receive an email verifying your email address. You must click the link in the email and verify your email address within 48 hours. If you do not respond within 48 hours, the request will be deleted.
5. After the AO (if you are not your own AO) and OCA IT Security have approved the request, you will receive an email from cls@sba.gov that your account has been approved.

B. EXISTING CLS

1. Go to the URL and agree to the terms in the warning banner by clicking "I agree to these terms".
2. Log into the system
3. At the top of the page, select "Profile"
4. Under "Supervisor Information", enter either the first and last name OR email address of one of the AOs and click "Lookup Supervisor by Email OR First Name/Last Name. Complete the form and submit request.

IV. Set Up Roles

- To originate loans in SBA One, a user must have ETRAN Origination, Partner Information Management System, and SBA One for the agreement level location id.
 - To service loans in SBA One, a user must have ETRAN Servicing.
1. Go to the URL and agree to the terms in the warning banner by clicking "I agree to these terms".
 2. Log into the system
 3. At the top of the page, select "Access"
 4. Click on the folder, select the box, and enter the location id for each required access level.
 - a. Originate Loans in SBA One
 - i. Select "Electronic Lending- Origination (ETRA)", check "Update", and enter the agreement level location id
 - ii. Select "Partner Information Management System (PIMS)", check "View", and enter the agreement level location id
 - iii. Select "SBA One" and enter the agreement level location id
 - b. Service Loans in SBA One
 - i. Select "Electronic Lending- Servicing (ETRA)", check "Update", and enter the agreement level location id
 5. You will receive an email that the account has been updated. THIS IS NOT AN APPROVAL FOR ACCESS.
 6. After the access is approved by the AO (they will have 48 hours from your request), Program Office and the CLS security team, you will receive an email from cls@sba.gov.

V. Enroll in SBA One Portal

The SBA One portal is an integrated portal managed in collaboration with Colson.

1. Go to the URL and agree to the terms in the warning banner by clicking "I agree to these terms".
2. Log into the system
3. On the "Choose Function" screen elect "SBA One". The system will redirect you to the Colson managed portal.
4. Select "OK" after reading the warning banner.
5. Enter your CLS password and click "Sign In".
6. On the opening page, select "Settings" at the top of the page.
7. Select "User Enrollment" on the settings page.
8. Select the SBA One roles that are applicable. Review the SBA One User Guide for a listed of the roles.
9. You will receive an email from SBATechSupport@colsonservices.com when you have been granted portal access.